INTERNET 20

ISP 18

ISP 22

Host CPU 12

14

16

24 26 28

FIG - 1

Preferences
Team Members
Access Control List
Project Details
Policies and Procedures
Project News
Define RFI Owners
Define Data Structure
Define Info. Modules
Define Project Portal
Import Project Definition
Create
Edit
Request Change
Request New Team Mem.

40

42

Personal Preferences
Define Preferences
Define Notifications
Define Personal Portal
Create
Edit
Clear to Default

FIG – 3

FIG – 4

30   36

								RFI	Create		Subscribe
Home	Refresh	Back	∨	Forward	Search			RFI	Create		Subscribe
Team		Sort		Printable Version		1 year	∨	Undo	Bookmark	Edit	Unsubscribe
Calendar		Split Scr.		10242 Seat Mechanism Proj.			∨	Logoff	Sync	Notepad	Notify

	X	Task Name	Owner	Start V	Due	Comp	D	I
Project Preferences								
Personal Preferences		Finalize Customer Contracts	Bill Jones	15-May	22-May	70%		
Project Plan		Pricing Agreements	Bill Jones	15-May	17-May	100%		
Document Manager		Schedule Agreements	Joe Adams	17-May	17-May	100%		
Task Manager		QA Requirements	Tom Smith	18-May	22-May	50%		
Tasks List		Complete Phase I Drawings	Karen Johnson	20-May	17-Jun	10%		
Tasks Reports		Component Parts	Kirk Wood	20-May	30-May	25%		
Task Detail		Sub-Assemblies	Corey Nast	29-May	15-Jun	10%		
Closed Tasks		Final Assembly	Kirk Wood	7-Jun	15-Jun	5%		
Archived Tasks		Bill of Material	Karen Johnson	15-Jun	17-Jun	0%		
Create	X	Investigate linkage field failure	Karen Johnson	22-May	10-Jun	25%		
Edit		Root cause analysis	Karen Johnson	22-May	7-Jun	90%		
Close		Corrective action plan	Karen Johnson	5-Jun	10-Jun	0%		
Notify		Create Phase I Testing Plan	Tom Smith	23-May	15-Jun	0%		
Archive		Draft Plan	Jeff Miner	23-May	5-Jun	0%		
Delete		Engineering Approval	Karen Johnson	3-Jun	8-Jun	0%		
Issue Manager		Manufacturing Approval	Andrew Sage	5-Jun	10-Jun	0%		
Meeting Center		Customer Approval	Bill Jones	8-Jun	15-Jun	0%		
Collaboration Center		Procure Phase I Prototypes	Laurie Snyder	10-Jun	25-Jul	0%		
RFI Manager		Component Parts	Laurie Snyder	10-Jun	14-Jul	0%		
Review Manager		Purchased	Laurie Snyder	10-Jun	12-Jul	0%		
Change Manager		Manufactured	Andrew Sage	10-Jun	14-Jul	0%		
Report Center		Assembly Fixtures	Tom Sayer	13-Jun	10-Jul	0%		
Finance Center		Check Fixtures	Tom Sayer	25-Jun	25-Jul	0%		

32   34   32

FIG - 2

Project Plan
Overview
Specs. / Requirements
Timing Plan
Tasks List
Budget
Calendar
Create
Edit
Notify
Archive
Delete

FIG – 6

Document Manger
Create/Upload
Upload Multiple Files
Edit
View
Download
Request Change
Request Review
Notify
Archive
Delete

FIG – 9

Notifications		

Documents
- Uploaded
- Changed
- Downloaded

Tasks
- Created
- Status Change
- Completed
- Late
- To be Completed in

Issues
- Created
- Status Change
- Completed
- Late
- To be Completed in

Chg. Req.
- Created
- Status Change
- Completed
- Late
- To be Completed in

Rev. Req.
- Created
- Status Change
- Completed
- Late
- To be Completed in

Finance
- Changes in Budget
- Variances Posted

RFIs
- Created
- Status Change
- Completed
- Late
- To be Completed in

Collab.
- Created
- With Voting
- Closed
- Late
- To be Completed in

Mtgs.
- When Scheduled
- Agenda Changes
- Minutes Postings
- To be held in

Proj Plan
- Chg in Milestone
- Any Change

Owned By: Created By:

New Members   Email   Doc. Attachments:
- On Pers. Portal   - HTML
- Both   - PDF
- Posted Version

Submit

FIG - 5

Milestones	2000												2001											
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
			P1					P2						R						FR				SP

Product Engineering
Prepare Phase 1 Design
Tool and Test P1 Prototypes
Prepare Phase 2 Design
Tool and Test P2 Prototypes
Final Design Changes
Obtain Mfg. Approval
Obtain Customer Approval
Release Design
Part Approval Sign Off
Production Line Sign Off

Purchasing
Pre Source Suppliers
Final Sourcing Decisions
Release Purch. Part P.O.s
Release Tooling P.O.s

Manufacturing Engineering
Review and App. P1 Design
Review and App. P2 Design
Pre Source Tooling Suppliers
Final Sourcing Decisions
Component Part Tooling
Part Approval

Manufacturing Plant
Prepare Line Design
Source and Release Suppliers
Fabricate Line
Receive Component Parts
First Run Production
Production Testing
Production Line App. Pkg.
Start Series Production

FIG - 7

File Summary

Thumbnail Picture

Title
Author
Author Co.
Chg. Owner/s
Last Modified By

Primary State
Secondary State
Version
Date
Create Date

Summary

File Type
File Size

View Access Rights

View Subscribers

View History

View Activity

View Reference Docs

View Options

HTML
PDF
Launch Application

Download Options

Current Version
PDF
HTML
Convert File to
Encrypt
Compress

Browse Pers. FM
Browse Sys. HD

Download

Subscribe

Notify

Request Review

Request Change

Edit

Close Form

FIG - 10

Project Timing Plan

Milestones / Gateways

Title	Date	Status	Symbol

☐ Add Another 6 Fields

Timing Plan

Functional Group / Milestone / Etc.	Owner	Start	Finish	Status	Comp %

Major Tasks

☐ Add Another 6 Fields

☐ Add Another 6 Fields

☐ Utilize Plan Above Without Attachment

☐ Utilize Plan Above With Auxiliary Attachment

☐ Utilize Only the Document Attachment

☐ Link Tasks to the Task Manager

Attach Document	Submit Plan

FIG - 8

Create / Edit Doucument File

Document Title   [_____] | Browse System HD |

Summary

[_____]

☐ Controlled   Document Author   [_____]
☐ Uncontrolled
☐ Change-Controlled...Change Owner
☐ WIP   [_____]

Define View Access

Define Edit Access

Notifications   Comments:

Store File At | Browse Project Data Structure | | Close Form |

| Submit as Reference | | Submit for Review | | Submit for Approval |

FIG - 11

Upload Multiple Files

Document Author

View Access   View Access

Controlled
Uncontrolled
Change-Controlled...Change Owner
WIP

Select Ind. Files   Select Folder   Browse System HD

Document Title

	Browse System HD	Browse Project Data Structure
	Browse System HD	Browse Project Data Structure
	Browse System HD	Browse Project Data Structure
	Browse System HD	Browse Project Data Structure
	Browse System HD	Browse Project Data Structure
	Browse System HD	Browse Project Data Structure

Submit as Reference   Close Form

FIG - 12

Task Detail

Task Name	
Task Description	

Start Date			Finish Date		
Status	YELLOW		Completion Percentage		25%

Summary	
Action Plan/ Completion Record	

Owner Name	
Owner Company	
Owner Group	

Task Hierarchy

Main Task Title
    Sub Task Title
        Sub Sub Task Title

Subscriptions/Notifications	View Related Issues/Mtgs
View Related Document List	View History of Task

Edit Task Information

Close Form

FIG - 13

Create / Edit Task

Task Name	

Task Description	

Start Date		Finish Date	

Status		Completion Percentage	

Summary	

Action Plan	

Owner Name	

Delegate To:	

Task Hierarchy
Main Task Title
Sub Task Title
Sub Sub Task Title

Create Sub-Task

View Related Document List	Define Related Doc. List
Subscription/Notification List	Define Subscrip / Notific. List
View Related Issues	Define Releated Issues

Submit Task	Close Task

FIG – 14

Issues Manager
Issues List
Issues Reports
Issue Detail
Closed Issues
Archived Issues
Create
Edit
Close
Notify
Archive
Delete

FIG – 15

Meeting Center
Scheduled Meetings
Meetings in Progress
Meeting Minutes
Archived Minutes
Create
Edit
Attend Meeting
Leave Meeting
Confirm Attendance
Notify
Archive
Delete

FIG – 16

Meeting Portal

Meeting Name
Chairperson

Mtg. Number

Invitees   Confirmed
                Invitees   Comments

Date   Time   Phone Mtg.
Location   Physical Mtg.
                         OnLine Mtg.
Phone Conference Details

Mtg Plan Creator   Notetaker
Online Coordinator

Agenda Item: Desired Outcome: Documents:

Thumb-nail	Thumb-nail	Thumb-nail	Submit Another
Thumb-nail	Thumb-nail	Thumb-nail	Submit Another
Thumb-nail	Thumb-nail	Thumb-nail	Submit Another
Thumb-nail	Thumb-nail	Thumb-nail	Submit Another
Thumb-nail	Thumb-nail	Thumb-nail	Submit Another
Thumb-nail	Thumb-nail	Thumb-nail	Submit Another

This is a recurring meeting every   Ending on

Attend Meeting

FIG – 17

Meeting Planner

Meeting Name

Chairperson

Mtg. Number

Invitees

◁

▷

Notification

Confirm Attendance

by

Reminder Date

Date   Time   Phone Mtg.

Location   Physical Mtg.

     OnLine Mtg.

Phone Conference Details

Mtg Plan Creator   Notetaker

Online Coordinator

Agenda Item: **Desired Outcome:**

		Attach Documents
		Attach Documents
		Attach Documents
		Attach Documents
		Attach Documents
		Attach Documents

Display Another 6 Fields

Comments

Make This a Recurring Meeting:

Weekly   Bi-weekly   Monthly (day)   Monthly (date)

End Date   or Number of Meetings

Copy To A New Mtg.

Submit Meeting

FIG – 18

Collaboration Center	
	Active Collaborations
	Closed Collaborations
	Archived Collaborations
	Create
	Edit
	Reactivate
	Close
	Notify
	Archive
	Delete

FIG – 19

Request For Information	
	Active RFIs
	Closed RFIs
	Archived RFIs
	Create
	Edit
	Respond
	Reactivate
	Close
	Notify
	Archive
	Delete

FIG – 22

FIG – 21

100 → Request For Information is made

102 → Designated Recipient / Owner recieves RFI

108 → Designated Delegate Receives RFI

106 → New Designated Owner Receives RFI

Reply

Delegate with Return

Delegate

Reply

Response Delivered

Reply

104
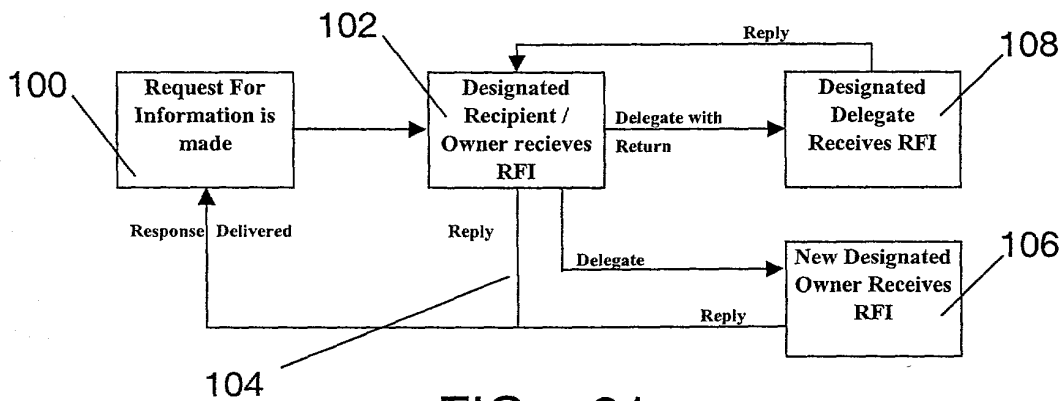
Finance Center	
	Summary View
	Detailed View
	Variances
	Reports
	Archived
	Create
	Edit
	Request Change
	Notify
	Archive
	Delete

FIG – 24

Report Center	
	Project Health
	Project Reports
	Project Activity
	Closed Reports
	Archived Reports
	Create
	Edit
	Save As Report
	Notify
	Close
	Archive
	Delete

FIG - 26

Create / Edit Collaboration Portal

Title [   ]   Facilitator [   ]

☐ Brainstorming   Synopsis of Issue/
☐ Problem Solving   Problem
☐ Decision Making
☐ Other [   ]

[Link to Issue]   [Attach/Edit Doc.]

Current Status [Red]   Deadline for Completion [   ]

Status Statement [   ]

Define Access   ☐ Send Nofications / Invitations

◁
▷   ☐ Send Notification of Change

                              Edit Access [   ]

Plan for Resolution   Action   Due Date

☐ Add 6 fields

☐ Enable Team Vote: Answers:
Question:

☐ Enable Threaded Discussion   Time Limit [   ]
☐ Enable Collaborator Comments   ☐ Public Viewing   ☐ Private Viewing
☐ Send Comments to Facilitator   ☐ Send Messages to Portal   ☐ Send to Both

[Submit Change]   [Submit Collaboration]   [Close Collab.]   [Delete]

FIG - 20

Create / Edit RFI

RFI Title [_____]   Date Required [_____]

- Category 1...name1   Request
- Category 2...name2   [_____]
- Category 3...name3
- Category 4...name4
- Category 5...name5
- Category 6...name6
- Other...Project Leader

Define View Access   Grant Edit Access

◁
▷

[Attach Documents]   [Delete RFI]

[Submit RFI]

FIG - 23

Create/Edit Budget

Define View Access   ☐ Send Notification

◁   ☐ Send Notification with Response Request
▷   Due Date [_____]

☐ Lock Budget as Created

Code	Line Item Description	Budget	Owner	Editor	Del

Total [_____]

- Add Main Item Lines
   - Add Secondary Item Lines
      - Add Tersiary Item Lines

Global Editor Dfn. [_____]

[Save Budget]

FIG – 25

Project Health		
		Due in 1 wk

Overall 132 / Green

20 - Purple

68 - Green   21

24 - Yellow   11

20 - Red   7

Milestones / Green   M1   G   M2   G   M3   Y

M4   G   M5   G   M6   G

Tasks 36 / Green

4 - P

20 - Green   10

8 - Yellow   2

4 - Red   1

Issues 36 / Green

12 - Purple

20 - Green   5

4 - Y   1

0 - Red

Changes 20 / Yellow

0 - Purple

8 - Green   3

12 - Yellow   5

0 - Red

Reviews 14 / Red

0 - Purple

8 - Green   2

0 - Yellow

6 - Red   4

RFI 24 / Green

4 - P

12 - Green   1

4 - Y   3

4 - Red   2

Sort Data	Save As a Report	Close Form

FIG – 27

| Request For Review is made by a Team Member | | Designated Recipient / Owner recieves Review Request | Delegate with Return | Designated Delegate Receives Review Request | | Designated Recipient / Owner recieves Review Request | Delegate with Return | Designated Delegate Receives Review Request |

Reply

Response Delivered · Reply · Delegate · New Owner Receives Review Request · Reply · Reply · Delegate · New Owner Receives Review Request · Reply

FIG – 31

Create / Edit Review Request

Review Title [   ]   Date Required [   ]
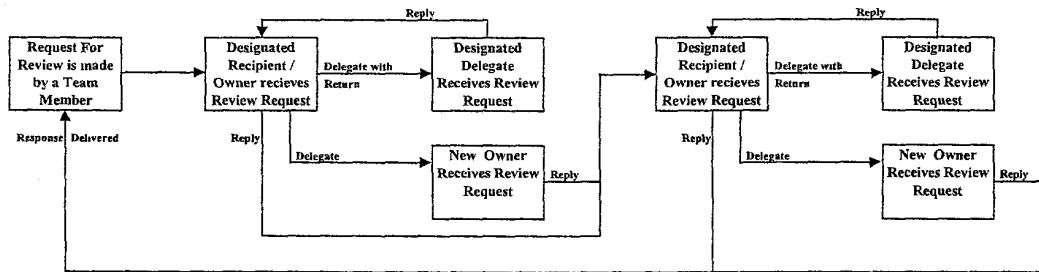
[ ] Parallel Routing Request   [ ] Serial Routing Request

Review Request

[   ]
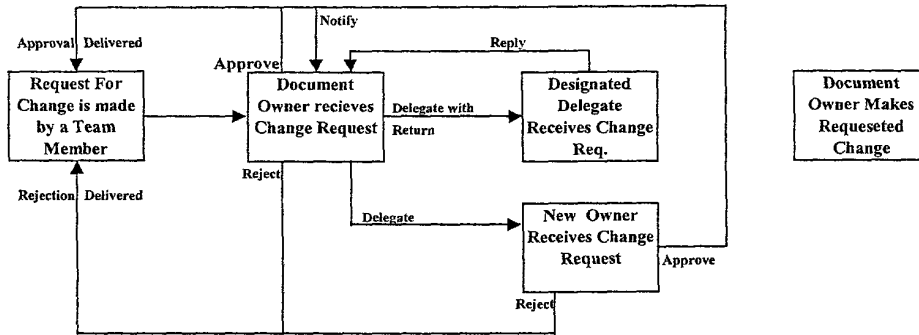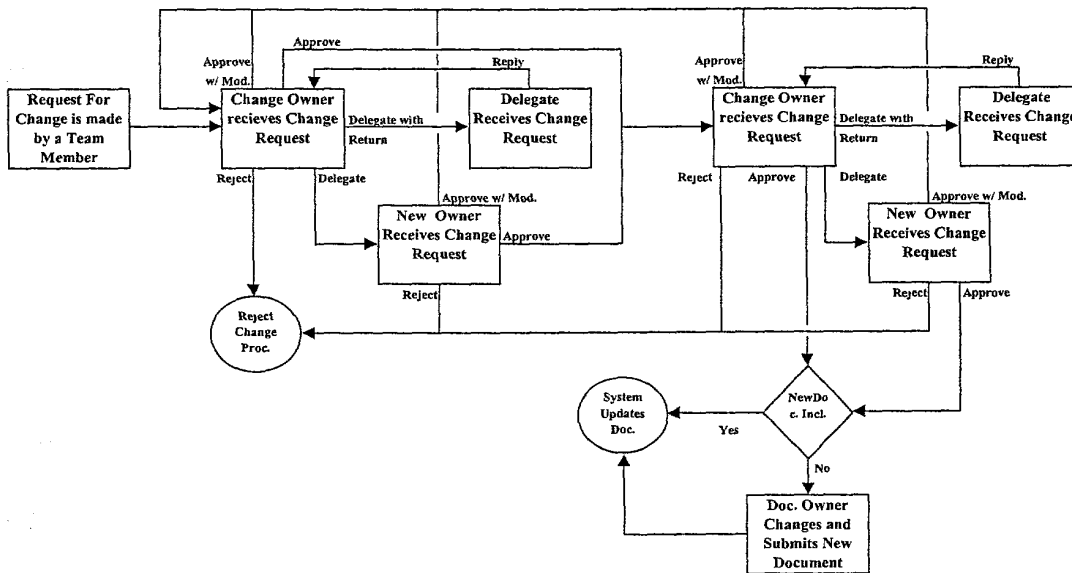
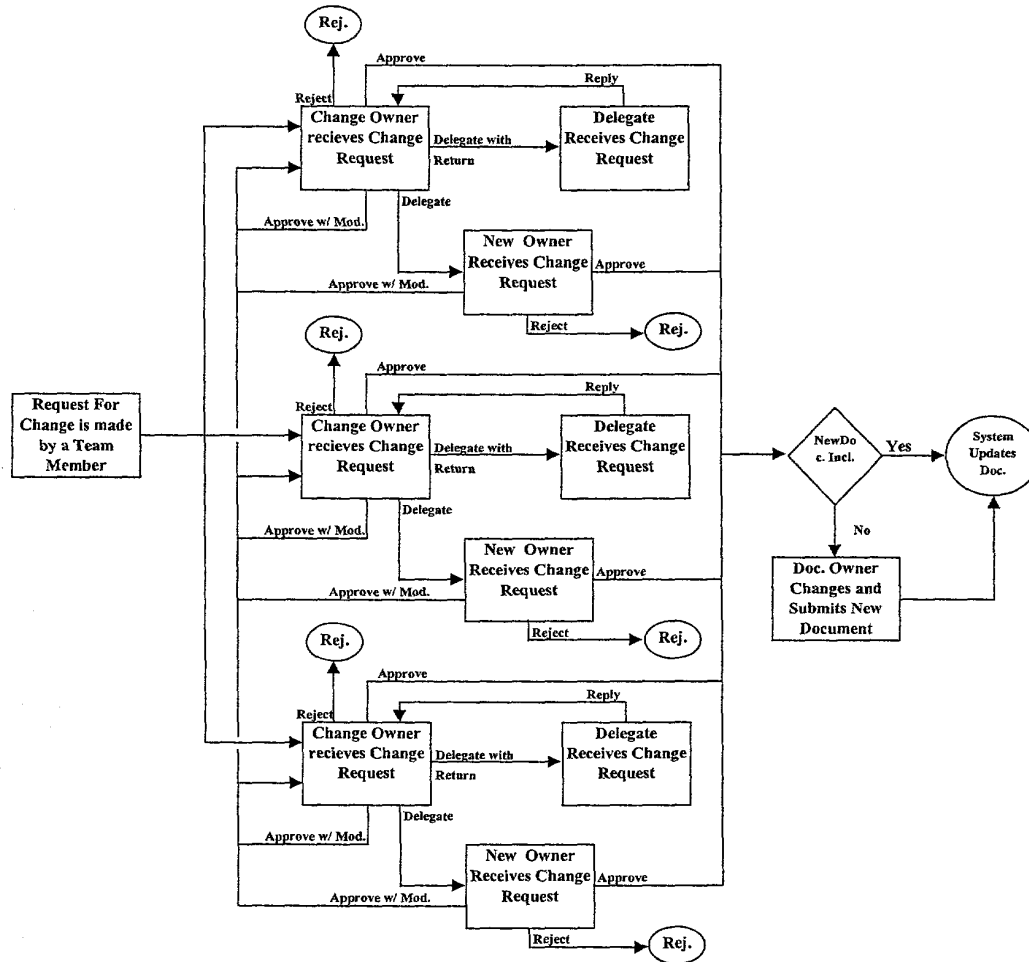Define Recipients

[   ] ◁ [   ]
             ▷

Define View Access

[   ] ◁ [   ]   Grant Edit Access
             ▷   [   ]

[Attach Documents]   [Delete Review Request]

[Submit Review Request]

FIG – 33

FIG - 34

FIG - 35

FIG - 36

Change Manger
Active Requests
Closed Requests
Archived Requests
Create
Edit
Approve
Approve w / Mod.
Reject
Reactivate
Notify
Close
Archive
Delete

FIG - 37

Create / Edit Change Request

Change Title [   ]   **Change #** [   ]

Change Request Description

[   ]

[Attach Requested Document]
[Attach Reference Documents]

Reason for Change

[   ]

Estimated Impact to Project Timing
[   ]

Estimated Impact to Project Budget
[   ]

Define View Access [   ] ◁ ▷ [   ]   **Grant Edit Access** [   ]

[Submit Change Request]   [Delete Review Request]

FIG – 38

FIG – 39

FIG - 40